

North Carolina COVID-19 Vaccine Management System (CVMS)

CVMS Provider Portal

Manage Appointment Scheduling User Guide

Version 1

March 12, 2020



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**





If you have any questions, issues or requests, please go to the
CVMS Help Desk Portal* at https://ncgov.servicenowservices.com/csm_vaccine

If you are in North Carolina, you can also call the COVID-19 Vaccine Provider Help Center at (877) 873-6247 and select option 8. The COVID-19 Vaccine Provider Help Center is available during the following hours:

Monday – Friday: 7:00 AM – 7:00 PM ET

Saturday – Sunday: 10:00 AM – 6:00 PM ET

* On the home page of the CVMS Help Desk Portal, select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, business e-mail, and your registration code

NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add "NCA" to the front of the six-digit PIN#)

*For providers who are not enrolled or may not have a Provider PIN, you may use the following generic Provider PIN to register:
VAC2021*

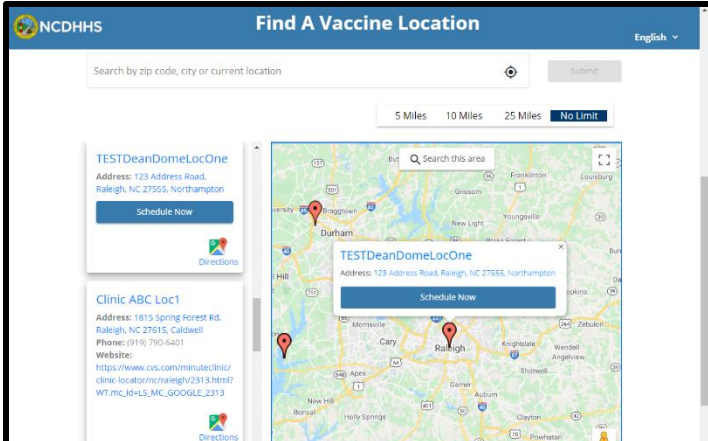
3. You will receive an e-mail with your username and temporary password to log into the portal

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Overview

Overview



The scheduling feature in CVMS is optional. It will allow your locations to release a certain number of appointment slots to the general public. People will be able to self-schedule their first appointment and register in CVMS altogether. You will then be able to schedule their 2nd dose appointment the day of their 1st dose appointment.

Note that these **appointments slots will be made available to the general public**. Therefore, this feature will NOT fit your needs if you vaccinate only a selected population group (e.g., long-term care facility, prison).

In this user guide, we will review how to activate and use the scheduling feature in CVMS. You will be able to:

- Activate the scheduling feature in CVMS
- Publish appointments on the Vaccine Site Locator website

The processes included in this user guide are for users with the **Healthcare Location Manager profile only**.

Additionally, you will need to:

- Use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers
- Log into the CVMS Provider Portal at <https://covid-vaccine-provider-portal.ncdhhs.gov> with your NCID username and password

Now, let's get started!

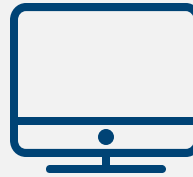
Appointment Scheduling Overview

The Appointment Scheduling process enables Healthcare Location Managers to adjust schedule availability and publish public-facing appointment slots on MySpot.nc.gov.



1

If you wish to use the scheduling feature in CVMS for your location, please submit a ticket via the CVMS Help Desk Portal at (https://ncgov.servicenowservices.com/csm_vaccine) to request this feature.



2

Once activated, you can set up the scheduling feature for your location(s) in the CVMS Provider Portal and allow recipients to self-schedule their first-dose appointments.



3

Set your weekly availability to receive appointments.

Update the number of first-dose appointments you can receive regularly.

CVMS Scheduling Key Terms

Appointments Per Time Window

The number of concurrent appointments this location can complete per stated time window duration. Keep in mind the number of clinicians available at the time.

Available Date*

This date indicates when the location appears on the Vaccine Site Locator to begin booking future appointments.

Start Date*

First day the location will show available appointment slots on the Vaccine Site Locator website (<https://MySpot.nc.gov>).

Closing Date

Last day the location will show available appointment slots on the Vaccine Site Locator website. If it is your primary location, select a date in the far future to avoid being delisted or leave it blank.

Vaccine Supply

The Vaccine (Appointment) Supply record is the number of appointments that are made available.

Current Stock

The total number of appointments your location will offer to recipients. This should match the number of doses to cover all existing and future appointments. If no stock remains, location won't display available slots.

Date of Stock Count

Date of creation of the Vaccine Supply Record. Once created, **do not edit this date.**

Dose Number

Create two vaccine supply records for 1st and 2nd dose. Use this field to identify if this vaccine supply includes 1st dose or 2nd dose vaccine.

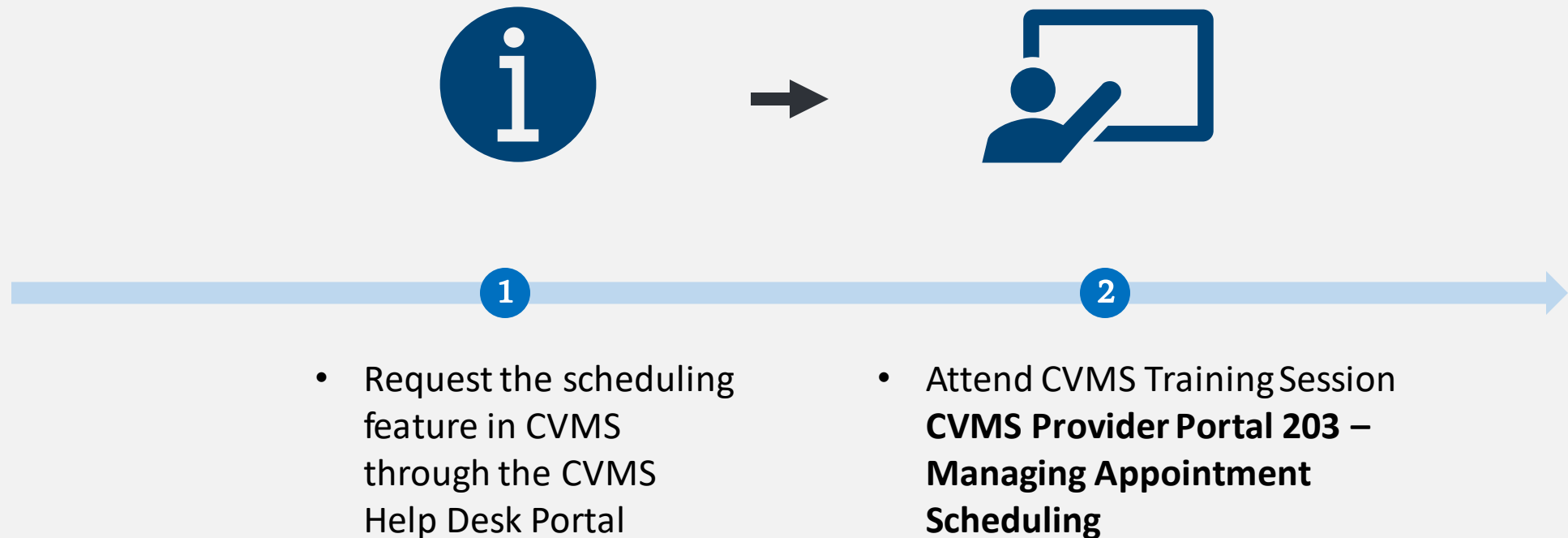
** This definition only applies to locations that are using the scheduling feature in CVMS*

Enable the Scheduling Feature in CVMS

Activate the Scheduling Feature

Enable Scheduling for your Location

Once your Location has submitted a request through the CVMS Help Desk Portal and your Healthcare Location Manager has attended a training session, the scheduling feature will be activated. The **LOCATIONS** tab will enable your Location Managers to add and manage appointments, and recipients to self-schedule their first dose appointments.



Request the Scheduling Feature via the CVMS Help Desk Portal

1. **LOG IN** the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine (see page 2 for instructions on logging in)
2. Select **VACCINE PROVIDER**
3. Submit a ticket requesting to activate the scheduling feature in CVMS for your location(s)

Audience

Healthcare
Location Manager

NCDHHS Knowledge Register **Login**

CVMS Help Desk Portal

Vaccine Provider
For use by Vaccine Providers

Vaccine Redistribution/Transfer
Request redistribution or transfer of COVID-19 vaccine inventory

Vaccine Recipient
For use by Vaccine Recipients

Organization/Employer
For use by front-line Organizations/Employers

Knowledge
Browse and search for articles

HCP Onboarding & Recipient Bulk Upload

Quick links for Vaccine Providers


1. Please **Login** using the username from the registration email, **NOT** your NCID.
2. If you are a first time user - please **Register**
3. Forgot your password? **Let's reset it!**

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Enable Scheduling for Your Location

Step 1 of 4: Navigate to the Locations Tab

1. Click on the **LOCATIONS** tab



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You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 10, 21, 08:00 AM	TJ TJ Dose 1 Scheduled	03045802	Clinic Location1
Mar 10, 21, 09:47 AM	Wednesday Morning Dose 1 Scheduled	03045809	Clinic Location1
Mar 10, 21, 09:57 AM	Jennifer Yu Dose 2 Scheduled	03045108	Clinic Location1
Mar 10, 21, 10:46 AM	Tar Ramses Heels Dose 1 Scheduled	03045812	Clinic Location1
Mar 10, 21, 10:48 AM	Buzz Fred Lightyear Dose 1 Scheduled	03045814	Clinic Location1

View all

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Audience

Healthcare
Location Manager

Step 2 of 4: Select the Location


1. Click on the **LOCATION NAME** for which you wish to enable scheduling using CVMS

Audience

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Tips

You can choose to enable the scheduling feature in CVMS for some or all your locations.



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Filter by Name

Filter by Address

Filter by Start Date

Filter by End Date

New

Location Name	Account	Address	Start Date	Closing Date	
Clinic Location1	Clinic Location1	Test Street, Raleigh, North Carolina 20175	03/10/2021	03/31/2021	

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Next

Step 3 of 4: Edit your Location Record

Navigating to the Details tab allows you to view and edit location details.

- 1. Click **EDIT**

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Location

Clinic Location1

Edit

Details

Related

Availability

Location Name

Clinic Location1

Appointments

Yes, Both

Start Date

3/10/2021

Region

Eastern Region

Account

Clinic Location1

Event Type

Short Term Community Event

Closing Date

3/31/2021

Location Setting

ncuat

Scheduling Information

CVMS Scheduling

Display on Vaccine Site Locator

Appointment Scheduling Website

Appointment Phone

222-333-4444

Step 4 of 4: Activate the Scheduling Feature of CVMS for your Location

The **CVMS Scheduling** checkbox indicates that this location will use the scheduling feature in CVMS. Note that if your request to enable the scheduling feature has not yet been approved, you will be unable to activate scheduling for this location.

1. To activate the scheduling feature in CVMS, check the **CVMS SCHEDULING** box
2. Click **Save**

The screenshot displays the 'Edit Clinic Location1 - Community Event 2' form within the NCDHHS CVMS Provider Portal. The form includes fields for Location Name, Start Date, Closing Date, Account, Event Type, and Scheduling Information. The 'CVMS Scheduling' checkbox is checked and highlighted with a red box. The 'Save' button at the bottom right is also highlighted with a red box.

CVMS Scheduling checkbox is checked.

Save button is highlighted.

Audience

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Tips

You may activate the scheduling feature in CVMS at any time if your request to enable the scheduling feature has been approved.

Create your Two Vaccine Supply Records

Step 1 of 8: Choose Location


The scheduling feature in CVMS requires you to maintain two vaccine (appointment) supply records: one record for the first-dose appointments and a second record for the second-dose appointments (if applicable).

However, once created, you will just need to maintain the first-dose appointment vaccine supply record if you follow these instructions.

- 1. Navigate to the **LOCATIONS** tab
- 2. Click on the location name hyperlink

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Filter by Name

Filter by Address

Filter by Start Date

Filter by End Date

Location Name

Account

Address

Start Date

Closing Date

Clinic Location1

Clinic Location1

Test Street, Raleigh, North Carolina 20175

03/10/2021

03/31/2021

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Step 2 of 8: Click 'New' to Create your Two Vaccine Supply Records

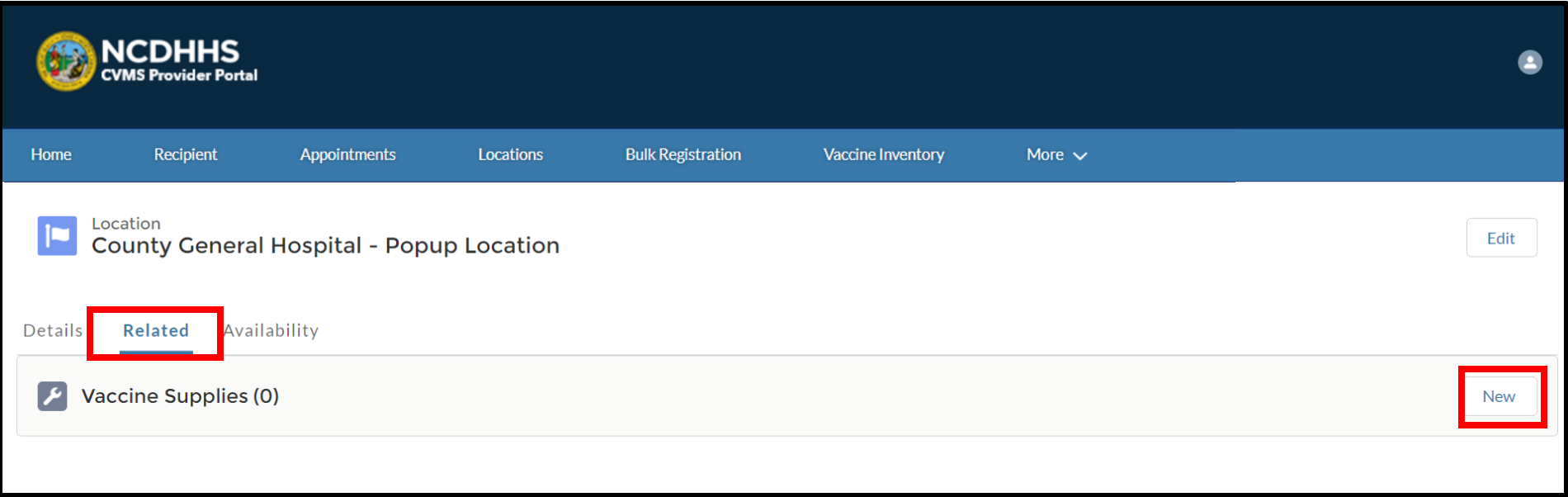
- 1. Click the **RELATED** tab
- 2. Click **NEW**

Audience

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Location Manager

Tips

If you already have created your two vaccine supply records, edit the existing record and do not create a new one.



Step 3 of 8: Create your 1st Dose Vaccine Supply Record

A **NEW VACCINE SUPPLY** pop-up window will appear.

1. In the **VACCINE** field, select the generic vaccine record **VAX-0000**
2. In **CURRENT STOCK** enter the number of appointment slots you wish to release
Note: If you do not know how many appointment slots to release yet, enter 0
3. Select today's date for **DATE OF STOCK COUNT**
4. In **DOSE NUMBER**, select **1**
5. Click **SAVE & NEW**

The screenshot shows a 'New Vaccine Supply' window. The 'Vaccine' field is set to 'VAX-0000', 'Dose Number' is '1', 'Current Stock' is '1,000', and 'Date of Stock Count' is '3/22/2021'. The 'Save & New' button is highlighted with a red box.

Audience

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Location Manager

Tips

Vaccine Supply in this instance means “Appointment” Supply.

Set Current Stock to equal the number of first-dose appointments you want to make available for that location between the **START DATE** and **CLOSING DATE**.

Step 4 of 8: Create Unlimited Record 2nd dose Appointments

1. In the **VACCINE** field, select the generic vaccine record **VAX-0000**
2. In **CURRENT STOCK** enter a random large number of appointments (e.g., 1,000,000)

Note: When recipients have received for their first-dose appointment, you will be able to schedule their second-dose appointment (if applicable). Therefore, we do not need to maintain the number of second-dose appointments to be released in the system because this number cannot exceed your number of scheduled first-dose appointments.

3. Select today's date for **DATE OF STOCK COUNT**
4. In **DOSE NUMBER**, select **2**
5. Click **SAVE**

The screenshot shows a 'New Vaccine Supply' form. A red rectangular box highlights the following fields: 'Vaccine' (set to VAX-0000), 'Current Stock' (set to 1,000,000), 'Date of Stock Count' (set to 3/22/2021), and 'Dose Number' (set to 2). The 'Location' field is also visible, set to 'Clinic Location1 - Community Vaccination Event'. At the bottom right, the 'Save' button is highlighted with a red box. The 'System Information' section at the bottom shows the owner as 'Simon Couderc'.

Audience

Healthcare
Location Manager

Tips

Once created, you will not need to maintain this record.

Publish Appointment slots using the Scheduling Feature in CVMS

Set Weekly Location Schedule for Dose 1 and Dose 2 appointments


Step 1 of 8: Navigate to the Location

Set the weekly schedule to share your available times to receive vaccine appointments. Note the same weekly schedule will be used to book 1st and 2nd dose appointments (if applicable). To begin, you must navigate to the location.

- 1. Click on the **LOCATION TAB**
- 2. Click on the **LOCATION NAME** hyperlink

Audience

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NCDHHS
CVMS Provider Portal

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Filter by Name

Filter by Address

Filter by Start Date

Filter by End Date

New

Location Name	Account	Address	Start Date	Closing Date	
County General Hospital - Popup Location	County General Hospital - Chicago ER	11 W Jones St, Raleigh, North Carolina 27607	03/04/2021	04/10/2021	
County General Hospital - Popup Location 2	County General Hospital - Chicago ER	123 Main Street, Raleigh, North Carolina 27607	03/04/2021	04/01/2021	
County General Hospital -	County General Hospital -	2110 Blue Ridge Rd, Raleigh,	03/05/2021	09/30/2021	

Step 2 of 8: Open the Availability tab

Each vaccination schedule for a location is created and managed on the **AVAILABILITY TAB**.

- 1. Click on the **AVAILABILITY TAB**

Location

County General Hospital - Popup Location

Edit

Details

Related

Availability

County General Hospital - Popup Location

Eastern

Location details

Address

11 W Jones St, Raleigh, North Carolina 27607

Description

Popup Location

Available Test Kits

100000

Time window duration (mins)

60

Start Date

03/04/2021

Closing Date

04/10/2021

Available Date

03/02/2021

Opening hours and capacity

Day	Opening hours	Appointments per time window
<input checked="" type="checkbox"/> TUE	<div>08:00 AM</div> <div>05:00 PM</div> <div>All Day</div>	<div>2</div>
<input checked="" type="checkbox"/> WED	<div>08:00 AM</div> <div>05:00 PM</div> <div>All Day</div>	<div>2</div>

Cancel

Save

Audience

Healthcare
Location Manager

Tips

All previously scheduled appointments will be unaffected by updates to the vaccination schedule.

Step 3 of 8: Enter Time Window Duration

The **TIME WINDOW DURATION (MIN)** is the length of time it takes for a single vaccinator to administer a vaccination (typically 15 minutes). The time window duration applies to all appointments. Appointments will be created at evenly spaced intervals throughout the **OPENING HOURS** at the location.

- 1. Enter the **TIME WINDOW DURATION (MIN)** applicable for the entire schedule at this location

Audience

Healthcare
Location Manager

Location

County General Hospital - Popup Location

Edit

Details

Related

Availability

County General Hospital - Popup Location

Eastern

Location details

Address

11 W Jones St, Raleigh, North Carolina 27607

Available Test Kits

100000

Start Date

03/04/2021

Available Date

03/02/2021

Description

Popup Location

Time window duration (mins)

60

Closing Date

04/10/2021

Opening hours and capacity

Day

Opening hours

Appointments per time window

☒

TUE

08:00 AM

05:00 PM

☐ All Day

2

☒

WED

08:00 AM

05:00 PM

☐ All Day

2

Cancel

Save

Step 4 of 8: Enter Start Date and Closing Date

First dose appointment slots will be available for recipients to book appointments between the **START DATE** and **CLOSING DATE** for a location.

1. Review the **START DATE** and update if needed (first date the site will offer available appointments to book on the Vaccine Site Locator website)
2. Review the **CLOSING DATE** and update if needed (last date that the site will offer available appointments to book on the Vaccine Site Locator)

The screenshot shows the 'Availability' tab for a location named 'County General Hospital - Popup Location'. The form includes fields for 'Address' (11 W Jones St, Raleigh, North Carolina 27607), 'Description' (Popup Location), 'Available Test Kits' (100000), and 'Time window duration (mins)' (60). The 'Start Date' (03/04/2021) and 'Closing Date' (04/10/2021) fields are highlighted with a red rectangle. Below these are 'Available Date' (03/02/2021) and 'Opening hours and capacity' section with a table for days, opening hours, and appointments per time window.

Day	Opening hours	Appointments per time window
<input checked="" type="checkbox"/> TUE	08:00 AM - 05:00 PM	2
<input checked="" type="checkbox"/> WED	08:00 AM - 05:00 PM	2

Audience

Healthcare
Location Manager

Tips

You may regularly edit the **CLOSING DATE** to extend it as you receive more **VACCINE INVENTORY**.

Second dose appointments will be available for booking by you to schedule appointments for recipients after the minimum period between 2 doses (if applicable). See the Addendum for CVMS Scheduling Feature User Guide for additional instructions at <https://covid19.ncdhhs.gov/vaccines/providers/covid-19-vaccine-management-system-cvms-steps-providers>.

Step 5 of 8: Enter Available Date

The **AVAILABLE DATE** indicates when available appointment slots will be offered to recipients. By having the available date before the start date, It will allow recipients to start scheduling appointments in advance.

1. Enter AVAILABLE DATE

Location

County General Hospital - Popup Location

Edit

Details

Related

Availability

County General Hospital - Popup Location

Eastern

Location details

Address

11 W Jones St, Raleigh, North Carolina 27607

Description

Popup Location

Available Test Kits

100000

Time window duration (mins)

60

Start Date

03/04/2021

Closing Date

04/10/2021

Available Date

03/02/2021

Opening hours and capacity

Day

Opening hours

Appointments per time window

TUE

08:00 AM

05:00 PM

All Day

2

WED

08:00 AM

05:00 PM

All Day

2

Cancel

Save

Audience

Healthcare
Location Manager

Step 6 of 8: Select Opening Days

A location will set weekly time to administer vaccinations from its **START DATE** to its **CLOSING DATE** for first dose appointments and second dose appointments.

1. Check the checkbox for each day you will administer vaccinations at this location

Opening hours and capacity

Day	Opening hours		Appointments per time window	
<input checked="" type="checkbox"/> MON	<div><div>🕒 08:00 AM</div><div>▼</div></div>	<div><div>🕒 05:00 PM</div><div>▼</div></div>	<input type="checkbox"/> All Day	<div>2</div> <div><div>⬆</div><div>⬇</div><div>⬆</div></div>
<input checked="" type="checkbox"/> TUE	<div><div>🕒 08:00 AM</div><div>▼</div></div>	<div><div>🕒 05:00 PM</div><div>▼</div></div>	<input type="checkbox"/> All Day	<div>2</div> <div><div>⬆</div><div>⬇</div><div>⬆</div></div>
<input checked="" type="checkbox"/> WED	<div><div>🕒 08:00 AM</div><div>▼</div></div>	<div><div>🕒 05:00 PM</div><div>▼</div></div>	<input type="checkbox"/> All Day	<div>2</div> <div><div>⬆</div><div>⬇</div><div>⬆</div></div>
<input checked="" type="checkbox"/> THU	<div><div>🕒 08:00 AM</div><div>▼</div></div>	<div><div>🕒 05:00 PM</div><div>▼</div></div>	<input type="checkbox"/> All Day	<div>2</div> <div><div>⬆</div><div>⬇</div><div>⬆</div></div>
<input checked="" type="checkbox"/> FRI	<div><div>🕒 08:00 AM</div><div>▼</div></div>	<div><div>🕒 05:00 PM</div><div>▼</div></div>	<input type="checkbox"/> All Day	<div>5</div> <div><div>⬆</div><div>⬇</div><div>⬆</div></div>
<input checked="" type="checkbox"/> SAT	<div><div>🕒</div><div>▼</div></div>	<div><div>🕒</div><div>▼</div></div>	<input checked="" type="checkbox"/> All Day	<div>5</div> <div><div>⬆</div><div>⬇</div><div>⬆</div></div>

Add another time

Audience

Healthcare Location Manager

Tips

Unselected days will not be open to appointments.

Step 7 of 8: Set Time Windows

For each open day you will need to set the **OPENING HOURS** per time window. You can have multiple time windows within the same day. To add another time window, click on the three dots on the right and select **ADD ANOTHER TIME**. For each time window, enter three pieces of data: start time, end time, and **APPOINTMENTS PER TIME WINDOW**. Appointments per time window is the number of people you can vaccinate at the same time.

1. Enter the **OPENING HOURS**
2. Enter the **APPOINTMENTS PER TIME WINDOW**
3. If needed, click on the three dots, and select **ADD ANOTHER TIME**

Available Date
03/17/2021

Opening hours and capacity

Day	Opening hours	Appointments per time window
<input checked="" type="checkbox"/> MON	<div>08:00 AM 12:00 PM</div> <div>12:00 PM 01:30 PM</div>	<div>4</div> <div>2</div>
<input type="checkbox"/> TUE	<div></div>	<div></div>
<input type="checkbox"/> WED	<div></div>	<div></div>
<input type="checkbox"/> THU	<div></div>	<div></div>
<input type="checkbox"/> FRI	<div></div>	<div></div>
<input type="checkbox"/> SAT	<div></div>	<div></div>
<input type="checkbox"/> SUN	<div></div>	<div></div>

Cancel Save

Audience

Healthcare
Location Manager

Tips

Do not check the **ALL DAY** checkbox as this will allow appointments to be scheduled over a 24-hour period.

You may not enter a time twice on the same day (e.g. a time window on Monday from 8 AM to 6 PM and another time window on Monday from 8 AM to 11 AM).

Step 8 of 8: Finalize Schedule

You have now created a schedule for your location.

1. **REVIEW** the schedule for the location
2. Click **SAVE**

Congratulations! You have now finalized the schedule for your location!

Opening hours and capacity

Day	Opening hours		Appointments per time window	
<input checked="" type="checkbox"/> MON	<input type="text" value="08:00 AM"/>	<input type="text" value="12:00 PM"/>	<input type="checkbox"/> All Day	<input type="text" value="4"/>
	<input type="text" value="01:30 PM"/>	<input type="text" value="06:00 PM"/>		<input type="text" value="4"/>
<input checked="" type="checkbox"/> TUE	<input type="text" value="08:00 AM"/>	<input type="text" value="06:00 PM"/>	<input type="checkbox"/> All Day	<input type="text" value="4"/>
<input checked="" type="checkbox"/> WED	<input type="text" value="08:00 AM"/>	<input type="text" value="08:00 PM"/>	<input type="checkbox"/> All Day	<input type="text" value="4"/>
<input checked="" type="checkbox"/> THU	<input type="text" value="08:00 AM"/>	<input type="text" value="08:00 PM"/>	<input type="checkbox"/> All Day	<input type="text" value="4"/>
<input checked="" type="checkbox"/> FRI	<input type="text" value="08:00 AM"/>	<input type="text" value="08:00 PM"/>	<input type="checkbox"/> All Day	<input type="text" value="4"/>
<input checked="" type="checkbox"/> SAT	<input type="text" value="09:00 AM"/>	<input type="text" value="04:00 PM"/>	<input type="checkbox"/> All Day	<input type="text" value="4"/>
<input type="checkbox"/> SUN	<input type="text" value=""/>	<input type="text" value=""/>	<input type="checkbox"/> All Day	<input type="text" value=""/>

[Copy to all selected days](#)

Audience

Healthcare Location Manager

Tips

The schedule determines the number of appointment slots. For an appointment to be made, there must be an open appointment slot and available vaccine (appointment) supply.

Caution on Non-Regular Events

Schedules are set on a weekly basis. The current settings do not allow you to easily accommodate non-regular situations. Examples of non-regular situations are holidays or exceptional closing days. The only way to cover them would be to edit your schedule.

Example: If you are not open next Wednesday, you will need to unselect Wednesday. The moment you click Save, there will be no availability on any upcoming Wednesdays that are published. Also, if a recipient already scheduled an appointment for that day, you would need to cancel and reschedule that appointment.

We know this might be a bit of a challenge. Please understand this is the first release of the scheduling feature in CVMS and our development teams are working on adding holidays and other improvements.



Add and Edit Number of Appointments

Setting Vaccine Supply



“Vaccine (Appointment) Supply” is what sets the total number of first dose appointments available

- Set 1st dose Vaccine Supply to equal the number of 1st dose appointments you want to make available for that location
- It does NOT need to be the same as your total inventory on hand.
 - If you need to hold back doses (e.g. set aside for a planned event, Historically Marginalized Population outreach), do not include those in the “Vaccine Supply”
- You should only release the number of First-Dose appointments you are able to cover with your doses


Step 1 of 4: Edit your 1st Dose Vaccine Supply Record

Once you published your first schedule and received your first appointments, you will need to regularly update the number of 1st Dose appointments released in the system.

- 1. Navigate to the **LOCATIONS** tab
- 2. Click on the location name hyperlink

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Filter by Name

Filter by Address

Filter by Start Date

Filter by End Date

New

Location Name	Account	Address	Start Date	Closing Date	
Clinic Location1	Clinic Location1	Test Street, Raleigh, North Carolina 20175	03/10/2021	03/31/2021	

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Step 2 of 4: Select your 1st Dose Vaccine Supply Record

- 1. Click on **RELATED**
- 2. Click on the **DOSE 1 VACCINE SUPPLY** record name

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Location

Clinic Location1 - Community Vaccination Event

Edit

Details

Related

Availability

Vaccine Supplies (2)

New

Name	Current Stock	Vaccine Brand	Dose Number
SUP-00055	1,000	Generic	1
SUP-00056	1,000,000	Generic	2


View All

Step 3 of 4: Edit your 1st Dose Vaccine Supply Record

- 1. Click on the **EDIT** button

Audience

Healthcare
Location Manager



Home

Recipient


Appointments

Locations

Bulk Registration

Vaccine Inventory

More

 Vaccine Supply
SUP-00052

Clone

Edit

DETAILS

RELATED

Name

SUP-00052

Vaccine

Current Stock

800

Date of Stock Count

3/11/2021


Location

[County General Hospital - Popup Location](#)

Vaccine Brand

Dose Number

1

 NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

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Step 4 of 4: Update the Number of 1st Dose Appointments Offered

1. Update the **CURRENT STOCK** amount to increase or decrease the number of 1st dose appointments offered

Note: Each appointment scheduled by a recipient will reduce the remaining number of appointments. Therefore, add to the current stock to allow for additional appointments.

For example, if you wish to allow 100 additional appointments and the current stock is set at 900, update the Current Stock field to show 1,000.

2. Click **SAVE**

The screenshot displays the NCDHHS CVMS Provider Portal interface. A modal window titled 'Edit SUP-00055' is open, showing details for a vaccine supply. The 'Current Stock' field is highlighted with a red box and contains the value '1,000'. The 'Save' button at the bottom right of the modal is also highlighted with a red box. The background shows the portal's navigation menu and a sidebar with details for the selected vaccine supply.

Audience

Healthcare
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Tips

There is no correlation between Vaccine Inventory and Vaccine (Appointment) Supply in CVMS. You need to be aware of your vaccine inventory and upcoming allocations to avoid over booking appointments and to track 1st and 2nd doses.

The change takes effect immediately, so this number should only be increased when the location has the supply to support additional appointments.

Recommendations

SCENARIO 1

ADD NEW VACCINE APPOINTMENTS

You may receive additional allocation, draw extra doses of the vaccine, or wish to offer additional appointments from your reserve supply. In this case, you can offer additional appointments to the public.

1 Calculate the new current stock quantity by adding to the Current Stock the amount of additional appointment slots you wish to allow

2 Update Current Stock of your 1st Dose Vaccine Supply record with the new amount once you are ready to offer the additional appointments. The additional appointments will be offered immediately so be sure not to increase the Current Stock before the additional vaccine is on-site.

To avoid mistakes:

- Only create the two VACCINE SUPPLY RECORDS for 1st dose and 2nd dose. Do not create additional VACCINE SUPPLY records.
- Do not update the DATE OF STOCK COUNT.

SCENARIO 2

TOO MANY APPOINTMENTS WERE RELEASED

If you realize you will not have vaccine inventory or capacity to allow as many appointments as you estimated AND if these appointments were not yet scheduled, you can edit your supply and just decrease the current stock to the amount of appointments you can accommodate.

1 Calculate the new current stock quantity by subtracting from the Current Stock value the amount of appointment slots you wish to remove

2 Update Current Stock with the new decreased amount

If appointments were already scheduled that you do not have the supply to complete, you may need to cancel overbooked appointments.

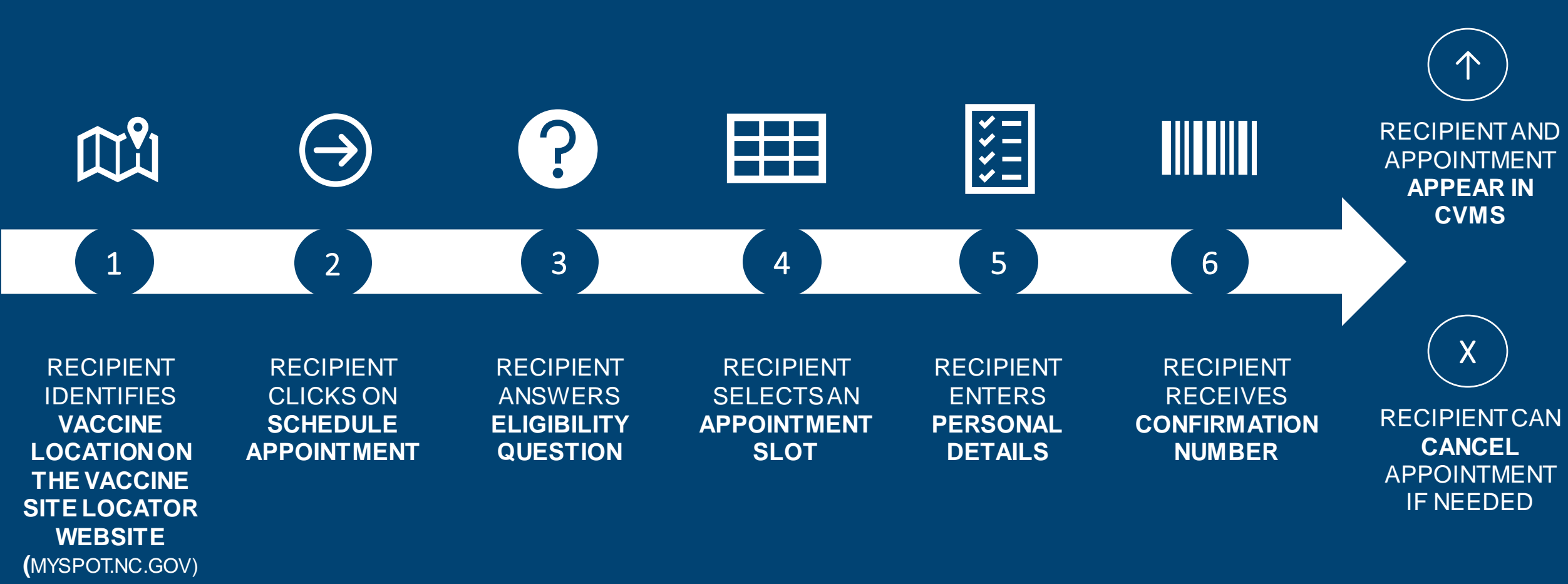
Audience

Healthcare
Location Manager

Scheduling from the Perspective of a Recipient

Scheduling from the Perspective of a Recipient





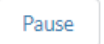
Below are the various activities included in the appointment scheduling process from the perspective of a Recipient.



Appendix

Additional Notes

Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- *** Asterisks** are used to denote required information.
-  A Toggle can be clicked to see selectable options.
-  A Pen can be clicked to make edits to the field.
-   Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
-  A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Contact Information:

- All questions should be directed to the CVMS Help Desk Portal at https://ncgov.servicenow.services.com/csm_vaccine.

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more information on supported browsers, see https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5
- Note: Internet Explorer and Edge (non-Chromium) browsers are not supported.

User Guide Change Log

Version	Date of Change	Changes Made	Impacted Slides	Author
1	03/12/2021	<ul style="list-style-type: none">Initial document	61	Kevin Kauffman, Kechia Scott, Kristin Clark